



DSG – Dillistone

21.50p ↓ 0.00 0%



EMS: 2k

Technology · Speculative · Micro Cap · Neutral

Market Cap
Enterprise Value
Revenue
Position in Market

£4.23m
£5.87m
£5.60m
1678th / 1,798

Quality
Value
Momentum

StockRank™

42

34

47

34



Momentum

Relative Strength (%)	
1m	+2.41% ●
3m	+3.19% ●
6m	+14.0% ●
1y	-13.0% ●
Volume Change (%)	
10d / 3m	-99.2% ●
Price vs... (%)	
52w High	-17.1% ●
50d MA	+3.17% ●
200d MA	+0.137% ●

Growth & Value

12m Forecast Rolling		Industry	Market
PE Ratio (f)	n/a	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
PEG Ratio (f)	n/a	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
EPS Growth (f)	n/a	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
Dividend Yield (f)	0.00%	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
Valuation (ttm)		Industry	Market
Price to Book Value	1.25	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
Price to Tang. Book	n/a	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
Price to Free Cashflow	29.6	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
Price to Sales	0.76	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>
EV to EBITDA	5.17	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>

Shareholder Activity

	Buy / Hold / Sell
Institutions	<div style="width: 100%;"></div>
Directors	<div style="width: 100%;"></div>
Community	Insufficient data available

Guru Screens

Dillistone didn't qualify for any screens.

Quality

	Industry	Market
Return on Capital	-3.4%	<div style="width: 100%;"></div>
Return on Equity	0.1%	<div style="width: 100%;"></div>
Operating Margin	-3.55%	<div style="width: 100%;"></div>

Financial Summary

Year End 31st Dec	2016	2017	2018	2019	2020	2021	2022E	2023E	CAGR / Avg
Total Revenue	£m 9.96	9.73	8.69	8.03	6.33	5.60	5.80	6.40	-10.9%
Operating Profit	£m 0.412	-0.364	-0.414	-1.09	-0.821	-0.199			
Net Profit	£m 0.526	0.057	-0.260	-0.842	-0.663	0.004			-62.3%
EPS Reported	p 2.62	0.290	-1.32	-4.28	-3.37	0.020			-62.3%
EPS Normalised	p 2.46	0.257	-1.32	-2.37	-1.91	0.040	-1.20	0.300	-56.1%
EPS Growth	% -58.9	-89.6							
PE Ratio	x					538		71.7	
PEG								0.154	

Profitability		2016	2017	2018	2019	2020	2021	2022E	2023E	CAGR / Avg
Operating Margin	%	4.14	-3.74	-4.76	-13.6	-13.0	-3.55			-5.74%
ROA	%		0.472	-2.33	-7.85	-6.47	0.043			
ROCE	%	5.35	-5.26	-6.45	-18.0	-13.0	-3.41			-6.79%
ROE	%		0.939	-5.16	-19.0	-18.0	0.118			-8.22%

Cashflow		2016	2017	2018	2019	2020	2021	2022E	2023E	CAGR / Avg
Op. Cashflow ps	p	10.6	9.51	5.80	2.72	3.58	5.85			-11.3%
Capex ps	p	5.61	7.59	7.81	5.59	4.94	5.13			-1.78%
Free Cashflow ps	p	5.04	1.92	-2.01	-2.87	-1.35	0.727			-32.1%

Dividends		2016	2017	2018	2019	2020	2021	2022E	2023E	CAGR / Avg
Dividend ps	p	4.18	0.500	0.000	0.000	0.000	0.000	0.000	0.000	-100%
Dividend Growth	%	+1.83	-88.0	-100						
Dividend Yield	%						0.000	0.000		
Dividend Cover	x	0.627	0.580							

Balance Sheet		2016	2017	2018	2019	2020	2021	2022E	2023E	CAGR / Avg
Cash etc	£m	1.54	1.39	0.725	0.690	1.29	0.764			-13.0%

Health Trend (F-Score)



Bankruptcy Risk (Z2-Score)



Earnings Manipulation Risk (M-Score)

Low

Other Ratios

Leverage (ttm)	Total	- Intang	+ Pension
Gross Gearing %	71.1	n/a	71.1
Net Gearing %	48.52	n/a	48.5
Cash / Assets %	8.90		8.9

Liquidity (ttm)	
Curr. Ratio	0.51 ●
Quick Ratio	0.51 ●
Interest Cov.	-2.01 ●

Efficiency (ttm)	
Asset Turnover	0.62
Recs Turnover	8.98
Stock Turnover	n/a

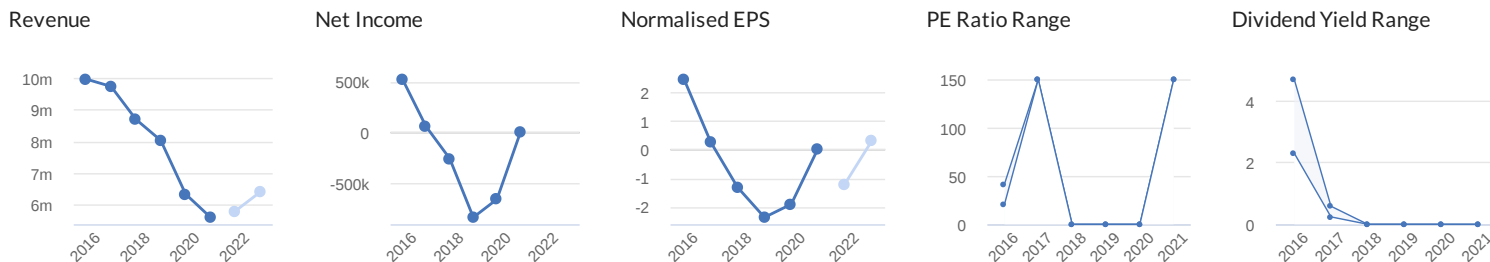
Working Capital	£m	-1.19	-1.54	-1.86	-2.40	-1.16	-1.33	
Net Debt	£m	-1.38	-0.999	-0.321	1.21	1.66	1.64	
Net Fixed Assets	£m	0.215	0.164	0.113	0.808	0.704	0.617	23.5%
Book Value	£m	6.91	5.23	4.85	4.01	3.37	3.38	-13.3%
Average Shares	m	20	20	20	20	20	20	0%
Book Value ps	p	35.1	26.6	24.7	20.4	17.1	17.2	-13.3%

FINANCIAL BRIEF: For the fiscal year ended 31 December 2021, Dillistone Group Plc revenues decreased 12% to £5.6M. Net... [See more](#)

Recent History

Latest interim period vs. prior period	Industry	Market
Sales Growth	88.33%	
EPS Growth	n/a	
3yr Compound Annual Growth Rate	Industry	Market
Sales CAGR	-13.64%	
EPS CAGR	n/a	
DPS CAGR	n/a	

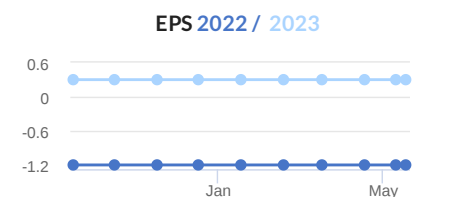
Graphical History



Analyst Forecasts

Price Target: 35.00p (62.79% above Price)	31st Dec 2022			31st Dec 2023		
	Net Profit (£)	EPS (p)	DPS (p)	Net Profit (£)	EPS (p)	DPS (p)
Est. Long Term Growth Rate:						
Consensus Estimate		-1.2			0.3	
1m Change		0.0			0.0	
3m Change		0.0			0.0	

Analyst Consensus



Profile Summary

Dillistone Group Plc is a United Kingdom-based company. The Company is engaged in the supply of technology solutions and services to recruitment, staffing and executive search businesses, as well as corporate talent acquisition teams. It enables recruitment firms and in-house recruiters to manage... [Read more](#)

Directors

- Jason Starr CEO (49)
- Alexander James OTH (48)
- Julie Pomeroy NED (65)
- Giles Fearnley NEC
- Paul Mather COO (45)
- Simon Warburton CTO (44)
- Steven Hammond OTH (38)
- Joanne Curd CFO (52)

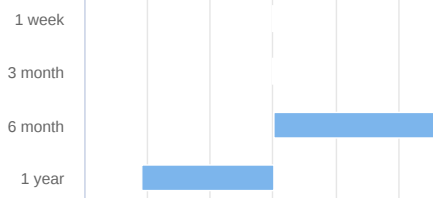
Last Annual	Dec 31, 2021
Last Interim	Dec 31, 2021
Incorporated	Oct 31, 2002
Public Since	Jun 15, 2006
Ex-Dividend Date	Jun 14, 2018
Payment Date	Jul 13, 2018
No. of Employees	97
No. of Shareholders	0

Sector	Technology
Industry	Software & IT Services
Index	FTSE AIM All Share Index
Exchange	LSE AIM Market
Asset Category	Common Stock
Shares in Issue	19,668,021
Free Float	7,490,350 (38.08%)
Eligible for	<input checked="" type="checkbox"/> ISAs <input checked="" type="checkbox"/> SIPPs

Address	12 Cedarwood, BASINGSTOKE, RG24 8WD, United Kingdom
Web	http://www.dillistonegroup.com/
Phone	+442077496100
Auditors	BDO LLP

DSG Share Price Performance

Share Price	Volume	Bid - Ask	Low - High	Spread
21.50p	14,400	20.00p - 23.00p	0.00p - 0.00p	1,395bps
Day's Change	Avg Volume	Open - Close	Range (12m)	Beta
↓ 0.00 0%	4,155	21.50p - 21.50p	18.00p - 25.92p	1.203



Latest News for DSG

- Apr 26, 2022 News

BRIEF-Dillistone Group FY Revenue Fell 12 Percent To 5.599 Million Stg
- Apr 26, 2022 News

BRIEF-Dillistone Group Says Ian Mackin To Be Interim Finance Director
- Apr 26, 2022 Announcement

Dillistone Group PLC - Directorate Change
- Apr 26, 2022 Announcement

Dillistone Group PLC - Final Results & Investor Presentation
- Apr 11, 2022 Announcement

Dillistone Group PLC - Block listing Interim Review

Upcoming Events for DSG

- Wednesday, June 15th 2022

Dillistone Group PLC Annual Shareholders Meeting
- Thursday, June 16th 2022

Dillistone Group PLC Annual Shareholders Meeting
- Wednesday, September 21st 2022

Half Year 2022 Dillistone Group PLC Earnings Release

Similar to DSG

Compare

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- Ackroo Neutral 32
- California Software Value Trap 31
- Carl Data Solutions Sucker Stock 3
- Cornerstone FS Sucker Stock 0
- Fastpasscorp A/S Sucker Stock 17
- Katapult Technology Sucker Stock 6
- Venzee Technologies Sucker Stock 10

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